

What is claimed is:

- 1 1. A method for processing customer leads comprising:
 - 2 configuring a lead processing system including
 - 3 accepting a specification of a plurality of users of the system, and
 - 4 accepting specifications of a plurality of rules that includes a set of global
 - 5 rules and for at least some of the users of the system distinct sets of rules associated with
 - 6 each of said users; and
 - 7 routing leads through the system including
 - 8 accepting a first lead at the lead processing system, including accepting
 - 9 values for each of a plurality of data fields associated with said lead,
 - 10 automatically applying one or more of the set of global rules to said lead,
 - 11 including applying a routing rule to said lead such that a first user is selected to receive
 - 12 said lead using the values of the data fields associated with said lead,
 - 13 automatically applying one of more of a first set of rules which are
 - 14 associated with the selected first user to the first lead, including applying a routing rule to
 - 15 said lead such that a second user is selected to receive said lead that includes a plurality
 - 16 of data fields, and
 - 17 notifying the selected second user of said lead, including providing values
 - 18 of one or more of the data fields.

1 2. The method of claim 1 wherein routing the leads through the system
2 further includes receiving a response from the second user related to the disposition of
3 said lead.

1 3. The method of claim 2 wherein receiving a response from the second user
2 includes receiving an acceptance of said lead.

1 4. The method of claim 2 wherein notifying the second user of said lead
2 includes withholding values of one or more data fields associated with said lead from the
3 second user, and wherein routing the leads further includes, after receiving the acceptance
4 of said lead, providing said withheld values.

1 5. The method of claim 2 wherein receiving a response from the second user
2 includes receiving a rejection of said lead, and wherein routing the leads through the
3 system further includes automatically re-routing said lead to another of the users of the
4 system.

1 6. The method of claim 1 wherein routing the leads through the system
2 further includes after expiration of a time interval after notifying the second user of said
3 lead during which neither an acceptance nor a rejection of said lead was received from
4 the second user, automatically re-routing said lead to another of said users.

1 7. The method of claim 1 wherein routing leads through the system further
2 includes routing each of a plurality of leads through the system resulting in different users
3 being notified of different of the leads.

1 8. The method of claim 1 wherein accepting the specifications of the rules
2 includes accepting a specification of the set of global rules from an administrator of the
3 system and accepting a specification of a set of rules associated with a first user from said
4 first user who is different than the administrator of the system, whereby configuring the
5 system is decentralized.

1 9. The method of claim 1 wherein accepting the lead includes accepting an
2 electronic communication initiated by a potential customer, wherein the electronic
3 communication includes at least some of the values of data fields associated with the
4 lead.

1 10. The method of claim 9 wherein accepting the electronic communication
2 includes accepting an electronic mail message.

1 11. The method of claim 1 wherein routing the first lead further includes
2 applying a prioritization rule including deriving a priority value for the lead from
3 values of one or more data fields associated with said lead.

1 12. The method of claim 11 wherein deriving the priority value includes
2 computing a weighted combination of the values of the one or more data fields.

1 13. The method of claim 11 wherein deriving the priority value includes
2 matching the values of the one or more data fields with a record in a data value and
3 retrieving the priority value from said record.

4 14. The method of claim 1 wherein routing the leads further includes
5 augmenting the lead including identifying information related to the lead.

1 15. The method of claim 14 wherein identifying information related to the
2 lead includes accessing information about a company related to the lead.

1 16. The method of claim 14 wherein identifying information related to the
2 lead includes providing product information related to the lead.

1 17. The method of claim 14 wherein identifying information related to the
2 lead includes providing sales material related to the lead.

1 18. Software stored on computer-readable media for causing a computer
2 system to perform functions including:
3 configuring a lead processing system including
4 accepting a specification of a plurality of users of the system and
5 accepting specifications of a plurality of rules that includes a set of global
6 rules and for at least some of the users of the system distinct sets of rules associated with
7 each of said users; and
8 routing leads through the system including
9 accepting a first lead at the lead processing system, including accepting
10 values for each of a plurality of data fields associated with said lead,
11 automatically applying one or more of the set of global rules to said lead,
12 including applying a routing rule to said lead such that a first user is selected to receive
13 said lead using the values of the data fields associated with said lead,
14 automatically applying one of more of a first set of rules which are
15 associated with the selected first user to the first lead, including applying a routing rule to
16 said lead such that a second user is selected to receive said lead that includes a plurality
17 of data fields, and
18 notifying the selected second user of said lead, including providing values
19 of one or more of the data fields.

1 19. A system for routing leads including:
2 a storage for a plurality of rules that include a plurality of distinct sets of rules
3 associated with different users of the system;
4 a storage for records each associated with a different leads being processed by the
5 system; and
6 an engine for applying the plurality of rules to the leads and for routing the leads
7 to users according to those rules, such that rules in each distinct set of rules are applied
8 only to leads that are routed to the user associate with said set of rules.

1 20. A system for processing customer leads comprising:
2 a first server including a storage for a first plurality of rules, a storage for a first
3 plurality of leads being processed by the system, an engine for applying the plurality of
4 rules to the leads and for routing the leads to users according to said rules, and a
5 communication interface for communicating with other servers;
6 a second server, including a storage for a plurality of leads; and
7 a communication channel coupled to the communication interface at the first
8 server and coupled to the second server for routing leads from the first server to the
9 second server and for passing status information for said leads from the second server to
10 the first server.

1 21. The system of claim 20 wherein the second server further includes a
2 storage for a second plurality of rules and an engine for applying the second plurality of
3 rules to leads received from the first server and for routing said leads to users according
4 to said rules.

1 22. A method for processing customer leads comprising:
2 configuring a lead processing system, including configuring a first server by
3 accepting a first plurality of rules for routing leads at the first server; and
4 routing leads through the system including
5 accepting a first lead at the first server, including accepting values for each
6 of a plurality of data fields associated with said lead,
7 automatically applying one or more of the plurality of rules to said lead,
8 including applying a routing rule to said lead such that a second server is selected to
9 receive said lead using the values of the data fields associated with said lead,
10 transmitting values of the data fields associated with said lead to the
11 second server, and
12 at the second server routing the lead to a user and notifying said user of
13 said lead.

1 23. The method of claim 22 wherein transmitting values of the data fields
2 associated with said lead to the second server includes withholding some of the value of
3 data fields associated with said lead from the second server.

1 24. The method of claim 22 wherein transmitting values of the data fields
2 associated with said lead to the second server includes formatting said values according
3 to an XML based protocol.

1 25. The method of claim 22 wherein configuring the lead processing system
2 further includes configuring the second server by accepting a second plurality of rules for
3 routing leads at the second server, and wherein routing the lead at the second server
4 includes applying said second plurality of rules to select the user to whom the lead is
5 routed.